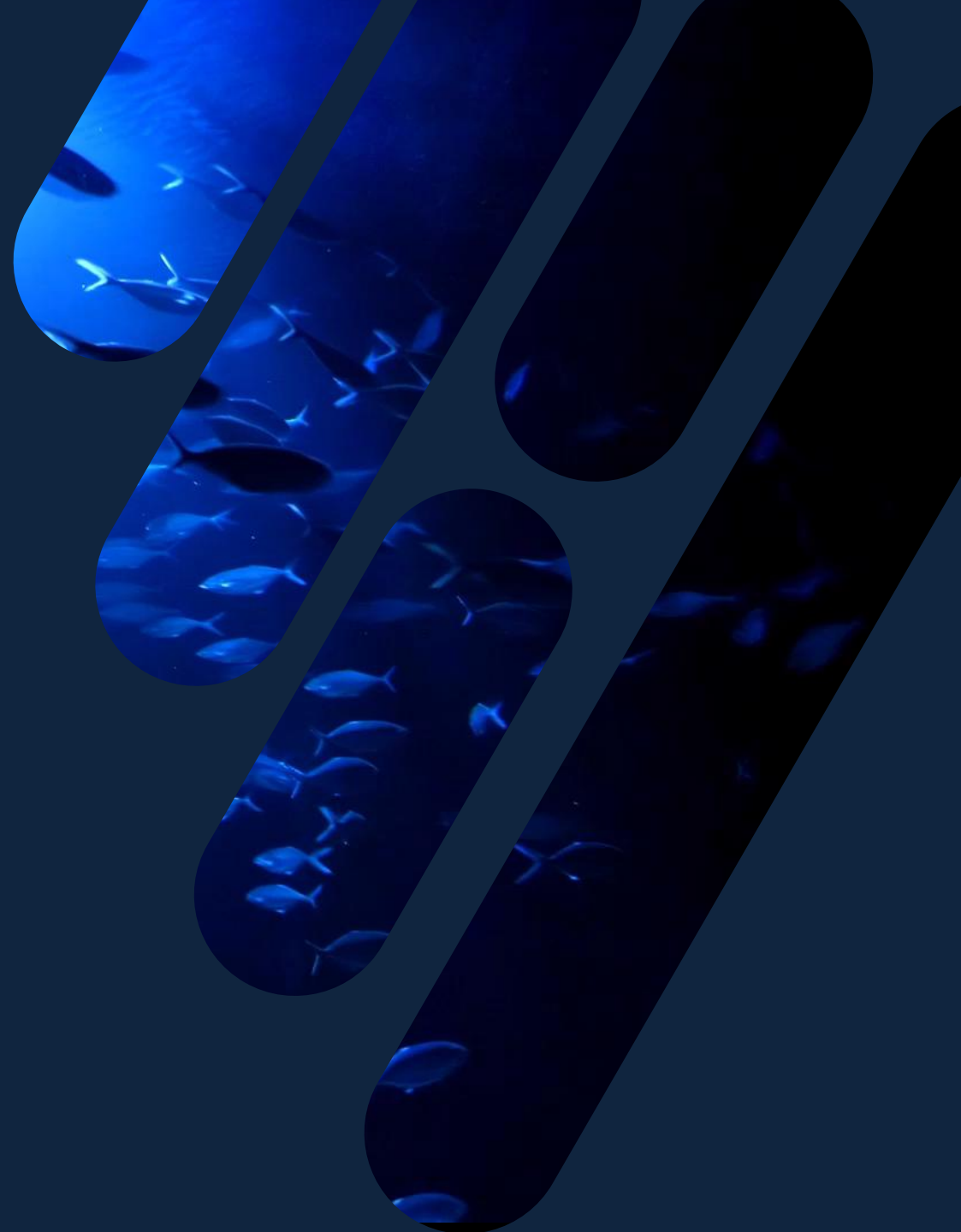




**HelioCentrix**  
IT Consultancy + Support

# AI Notetakers Webinar

April 2025





# AI Notetakers Webinar

April 2025

The webinar will start at 2pm

All participants will automatically have cameras and microphones turned off

We will have a section for Q&A at the end so please post any questions using the Q&A option on the top menu





# AI Notetakers & Fireflies.ai

Presented by John Speed, Heliocentrix  
April 2025



# General House Keeping

This is a webinar hosted with Microsoft Teams and your Microphone and Camera will be off for the duration of the meeting

We will have some time at the end for Q&A and if you have any questions about this or other AI or Microsoft 365 systems then please ask them using the Q&A option

The Webinar will be recorded. You will be sent notes at the end.



# Today's Speakers:

John Speed, Managing Director Heliocentrix

For the last 20 years John has been working with Small Businesses to improve their technology either through support or digital transformation. During the last 20 years John has worked with businesses of varying sizes, industries and stages in their business life.

John has also worked with clients on setting up a few a few joint ventures which he was involved heavily in the operational development of these organisations.



## Agenda

- Guide to selecting software
- What are AI Notetakers?
- Why we chose Fireflies.ai?
- How does Fireflies.ai work?
- What's next for AI Note Taking
- Q&A

# Considerations when selecting new software







# AI Notetakers

- Join meetings and take transcripts
- Generate detailed notes
- Answer questions
- Identify Tasks
- Generate other insights



# AI Notetakers

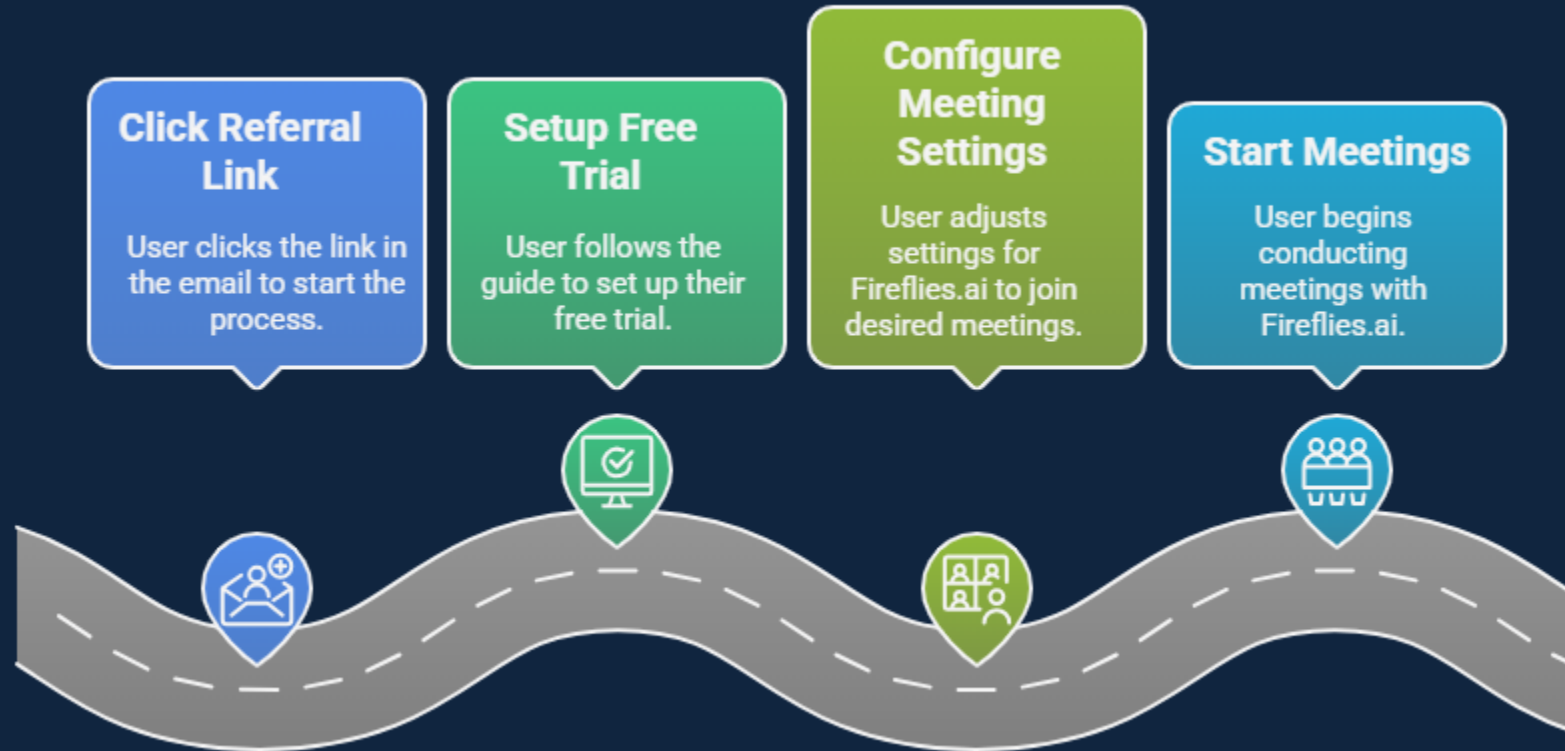
- Sharing with team mates to hand over work
- Sharing externally with customers & suppliers
- Revisit meetings days or weeks later to ask questions



# Fireflies.ai

- Meet all our requirements for software
- Consistent signs of development
- Usable on all meeting platforms regardless of whether you are organiser or not
- Usable during in-person meetings

# Getting Started



- Home
- Meetings
- Meeting Status
- Playlist
- Contacts
- Uploads
- Integrations NEW
- AI Apps
- Topic Tracker
- Analytics
- Team
- Upgrade
- Settings

My Feed   Tasks   AI Apps NEW

Recent · 1 Meeting Share Feedback

**Demo-Alex-Thomson\_2025-04-03.mp3**  
Sat, Apr 5 · 12:18 PM

- Interview Overview:** Alex Thomson interviewed for a technician role, highlighting his four years of helpdesk experience.
- Technical Skills:** He successfully resolved a complex computer crash but lacks Microsoft 365 management experience.
- Problem-Solving Approach:** Alex discussed his troubleshooting tools and acknowledged inconsistent documentation practices.
- Salary and Goals:** He asked about salary ranges and expressed ambitions to become a network engineer earning £65K.
- Career Aspirations:** Alex aims to advance his career and work on larger projects within the company.

Add to live meeting

**Fireflies Notetaker**

Auto join calendar meetings  
All meetings with web-conf link

Send email recap to  
Only me

Meeting language [English \(Global\)](#)

Upcoming Meeting · 1

Tue, Apr 08 1 [Join All](#)

02:00 PM

AI Notetakers Webinar

EN

# Demo 1: General Meeting

A basic meeting between two people

## Demo – Alex Thomson

John Speed Apr 03 2025, 4:28 PM 🗣️ · English (UK) ▾

📄 General Summary ▾ ✨ Customize

+ AI Apps ⋮

IT support technician troubleshooting documentation incident prioritisation career development technical skills

### Overview

The job interview meeting focused on Alex Thomson's candidacy for a FirstLine IT support technician position, conducted by John Speed. The discussion began with an introduction to Alex's four years of IT experience, emphasising his involvement in customer support through phone and email. Alex articulated his desire to enhance his skills and engage with larger projects, noting his attraction to Heliocentrics based on their interesting work and positive company reviews. His current role involves managing help desk inquiries, primarily resolving hardware and software issues, but he finds this repetitive and seeks a more in-depth experience. Throughout the interview, Alex demonstrated a sound understanding of troubleshooting processes and highlighted his commitment to customer service, illustrated by his successful documentation of recurring HP printer issues that led to firmware updates. He expressed a salary expectation of £28,000, with a career goal of becoming a network engineer earning £65,000 within five years. The meeting concluded with John Speed promising to follow up with Alex regarding the next steps in the hiring process.

### Notes

#### 🗨️ Introduction and Background (00:08 - 02:37)

- John Speed conducted a recorded interview with Alex Thomson for a FirstLine IT support technician position
- Alex has worked in IT for 4 years across various companies, handling customer inquiries via phone and email
- Alex is looking to develop skills and participate in bigger projects
- Alex was attracted to Heliocentrics due to interesting projects, office location, good company reviews, and benefits



#### 📁 Current Role and Experience (02:37 - 04:35)

- Alex currently works on a help desk handling hardware/software issues like printer problems, password resets, mobile phone issues
- Alex finds current work repetitive with limited depth

## General Overview

## Summary Notes

#### Documentation and Customer Service (09:11 - 12:52)

- Alex tries to document issue resolutions but acknowledges time constraints often limit detail
- Recognises downsides of poor documentation include inability to reference previous solutions
- Successfully documented recurring HP printer issues which led to identifying a firmware bug
- Escalated printer issue to manufacturer, resulting in firmware update for six affected printers
- Handles frustrated users by staying calm and working to resolve issues quickly 
  - Staying calm helps to de-escalate the situation and makes the user feel heard and understood.
  - Quickly resolving issues addresses the user's immediate concerns and reduces their frustration.
  - Effective communication during the process keeps the user informed and reassured, fostering a positive relationship.
- Went above and beyond at Global Connect by following up with a client about internet connection issues 

#### Job Details and Career Goals (12:52 - 15:12)

- Salary range for position is £27,000-£32,000; Alex's expectation is £28,000
- No work-from-home options for entry-level position but possibilities as career progresses
- Training and mentoring are available to help employees develop skills
- Alex aims to become a fully qualified network engineer earning £65,000 within five years
- Alex has holiday booked in June, approximately two-week notice period, and possesses UK driving licence with six points
- Interview concluded with John promising to be in touch about next steps

#### Action items

#### John Speed

- Contact Alex Thomson with next steps in the hiring process (15:05)

List of  
Actions

Expandable  
Notes



# Demo 2: New Client Onboarding

Conversation between service provider and a new client to find out what their current situation is. In this example it is based on questions that may be used by financial services.

1. What was the client's name?

James Earl

2. What is their current income?

£40,000 a year (before tax)

3. Do they have any other income?

Yes, his wife earns around £35,000 a year.

4. What are the client's current savings and investments?

£10,000 in cash (emergency fund) and £75,000 in stocks and shares.

5. What are the client's pensions worth?

£25,000 in his pension and a similar figure for his wife.

6. What is the client's Attitude to Risk Score?

Approximately 3.5

7. What loans and debt does the client have?

No other loans or debt outstanding.

8. What credit cards does the client have?

Credit cards but no credit card debt on them; they are paid off each month in full.

9. What mortgages does the client have?

A buy to let property valued at £300,000 with about 50% of the mortgage remaining and a mortgage on his current home valued at about £450,000 with 75% remaining.

# Demo 3: Board Meeting

Board meetings are important to capture all relevant actions. Using Fireflies during a board meeting allows participants to be present in the meeting rather than trying to record minutes and actions.

Here is a table of actions based on the transcript:

Action	Responsible	Due Date
Send out monthly newsletter	James Earl	10th April 2025
Create standardised proposal templates	John Speed	End of next month
Review all outstanding HR contracts in line with government changes	HR Department	30th April 2025
Review all staff salaries in line with the increase in minimum wage	HR and Payroll	30th April 2025
Complete the annual budget for the 2025-2026 financial year	CFO	15th May 2025
Review and update the risk assessments for ladder usage	Ethan Kent	15th April 2025
Review the risk register	John Speed	15th June 2025

# Demo 4: Recruitment Interview

Interview for a job as an IT Support Technician

## Demo-Alex-Thomson\_2025-04-03.mp3

[Dave England](#) Apr 05 2025, 12:18 PM English (Global) ▾

Generic Hiring ▾ [Customize](#)

+ AI Apps ...

### Skills and Experiences

Edit  ▾ ...

#### Skills and Experiences (00:00 - 00:00)

- Four years of IT support experience, primarily in customer service roles.
- Proficient in troubleshooting hardware and software issues, including printer problems and user setup.
- Demonstrated problem-solving skills by resolving complex computer crashes and identifying faulty drivers. [+](#)
- Experience in escalating issues to senior IT teams and utilizing diagnostic tools like event logs and remote support software.
- Ability to document recurring technical issues and communicate effectively with frustrated users to ensure quick resolutions.

### Compensation and Availability

#### Compensation and Availability (13:02 - 15:12)

- Salary range for the position is £27,000-£32,000; Alex's expectation is £28,000.
- No work-from-home opportunities for entry-level position but possible with career progression.
- Alex has a holiday booked in June and is uncertain about his notice period.

### Candidate Background

#### Candidate Background (00:00 - 00:00)

- Candidate Name: Alex
- Position Applied: FirstLine IT Support Technician
- Experience: 4 years in IT support
- Current Role: Help desk technician handling customer inquiries

## Summary of Skills

Key information that the candidate has given about their availability

**D** You

What areas were left unanswered?

 AskFred

The transcript covers a wide range of topics related to the interview, but there are a few areas that remain unanswered or could benefit from further clarification:

- 1. Specific Technical Skills:** While Alex mentions experience with various IT tasks, there is no detailed discussion about specific technical skills or certifications he possesses (e.g., networking, specific software tools, or programming languages).
- 2. Experience with Microsoft 365:** Alex states he has no experience with Microsoft 365 management, which could be a concern depending on the job requirements. Further inquiry into his willingness to learn or adapt to new tools could be beneficial.
- 3. Handling Stressful Situations:** Although Alex discusses how he deals with frustrated users, there is no exploration of how he manages stress or high-pressure situations personally.

- 4. Team Collaboration:** The interview does not delve into Alex's experience working in a team environment or how he collaborates with colleagues on projects.
- 5. Future Learning Goals:** While Alex expresses a desire to grow in his career, there is no specific mention of what areas he is particularly interested in learning more about or how he plans to achieve his career goals.
- 6. Clarification on Notice Period:** Alex is uncertain about his notice period, which could be a potential issue for the hiring process. A clearer understanding of this would be necessary.
- 7. Driving License Details:** Although Alex mentions having a driving license with points, there is no discussion about whether this impacts his ability to fulfill job responsibilities that may require driving.

**D** You

Can you suggest questions for a second interview?

 AskFred

Certainly! Here are some suggested questions for a second interview that can help delve deeper into the candidate's qualifications, fit for the role, and future potential:

#### Technical Skills and Experience

1. Can you elaborate on your experience with troubleshooting complex network issues? Can you provide specific examples?
2. What tools or software have you used for remote support, and how do you determine which tool to use for a particular situation?
3. Have you had any experience with Microsoft 365 or other cloud-based services? If not, how do you plan to get up to speed?
4. Can you describe a time when you had to learn a new technology quickly? What was your approach?

#### Additional Questions

18. Do you have any questions about the team you would be working with or the projects you might be involved in?
19. Is there anything about your previous roles that you feel has particularly prepared you for this position?
20. What are your expectations regarding work-life balance, and how do you manage your time effectively?





You

Can you draft a follow-up letter to Alex inviting him to a second interview on April 9th at 2pm and include that we need him to bring proof of eligibility to work in the UK



AskFred

Subject: Invitation for a Second Interview

Dear Alex,

Thank you for your time and insights during our recent interview for the IT Support Technician position. We enjoyed learning more about your background and experiences in IT support.

We are pleased to invite you for a second interview to further discuss your qualifications and how you can contribute to our team at Heliocentrix. The second interview is scheduled for April 9th at 2:00 PM.

Please bring proof of your eligibility to work in the UK with you to the interview. This documentation is necessary for our records.

Let us know if this time works for you or if there are any conflicts we should be aware of. We look forward to the opportunity to speak with you again and explore your potential role with us.

Thank you once again for your interest in joining our team. We look forward to hearing from you soon.

Best regards,

John Speed

[Your Job Title]

Heliocentrix

[Your Contact Information]

[Company Address]



## What's Next for AI Notetakers?

Most AI Notetakers are isolated systems currently, though I appreciate some are trying to develop more integrations.

We would expect to see:

- More Realtime integrations with the notetakers during the meeting. (This has started but there is a way to go)
- Tighter integrations to other systems, particularly task management





Question:

How does Fireflies.ai compare with Microsoft Copilot?



Question:

How much does Fireflies.ai  
cost?



Question:

What happens if Fireflies.ai makes a mistake?



# Thanks for joining!

You will shortly receive an email with a link to the following information:

- Webinar slides
- Webinar recording
- Referral link to sign up to Fireflies.ai
- Sign up form for our next webinar
  - Microsoft Copilot Chat
  - 6<sup>th</sup> May @ 2pm
- Modern Software Selection Guide request form
- Link to book a Fireflies.ai setup and training call